



Success Start

You're on your way to delivering exceptional creative, faster.

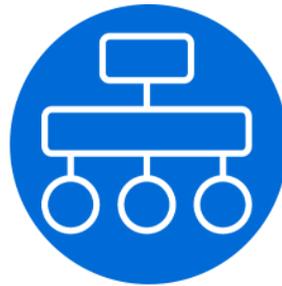
Program Overview

Ziflow's Success Start gives you professional, personalized instruction in three key areas:



Account setup

Ensure that your Ziflow account is configured to best suit the unique needs of your organization.



Workflow optimization

Combine your unique business processes with industry best practices. We will work with you to create a library of workflow templates specific to your organization.



User training

Ensure that your administrators and power users can make the most of Ziflow, plus on-demand training modules to help all users quickly adopt Ziflow's review and approval tools.



As part of Ziflow's Success Start, you will work with a dedicated Customer Success Manager who will help you to:

- Set up your Ziflow account in detail
- Define your current and ideal review and approval workflows
- Gain a deep understanding of the platform's functionality through comprehensive, customized training sessions
- Implement integrations and automation from Ziflow Connect
- Continuously optimize with ongoing strategic guidance
- Confidently manage your creative collaboration processes and system settings



By the end of Success Start, you and your team will be experts at:

- Using Ziflow's full range of commenting and annotation tools for all types of creative assets
- Managing the review and approval process through multiple versions to final approval
- Implementing customized workflows that create accountability across your internal and external approval processes
- Creating custom views to improve tracking and visibility across all of your work in progress

Program Details

Success Start will get your Ziflow system fully implemented in four steps.

SESSION

1 Discovery workshop and admin setup

2 Team training - Part 1

3 Team training - Part 2

4 Post-launch touch base

Discovery Questionnaire

Prior to your first session, complete the Discovery Questionnaire.

Your responses give your Ziflow expert a detailed understanding of your current processes, workflows and key objectives to ensure that Ziflow is configured to meet your specific needs.

SESSION

1 Discovery workshop and admin setup

2 Team training - Part 1

3 Team training - Part 2

4 Post-launch touch base

 **Agenda**

In **Discovery workshop and admin setup**, we will:

- Review details gathered in your Discovery Questionnaire
- Walk through account settings and customizations
- Configure global account settings

 **Goal**

Lay the foundation that sets your team up for success, including account management, user setup, reviewers and asset settings.

 **Attendees**

Anyone in your team that has an administrator role in the deployment, management and approval of creative processes.

SESSION

1 Discovery workshop and admin setup

2 Team training - Part 1

3 Team training - Part 2

4 Post-launch touch base

 **Agenda**

In **Team training - Part 1: Workflow setup**, we'll cover:

- Configuration of workflow templates based on your processes
- A step-by-step walkthrough for uploading assets
- Settings across all asset types
- In-depth functionality training within the asset viewer
- Best practices for asset management, including filters and folders

 **Goal**

Give your team a clear understanding of asset sharing, routing, management and approval.

 **Attendees**

Anyone that is going to be creating and managing assets.

SESSION

1 Discovery workshop and admin setup

2 Team training - Part 1

3 Team training - Part 2

4 Post-launch touch base

 **Agenda**

Team training - Part 2: Feedback management will cover:

- Any outstanding questions from the previous session
- A how-to for providing feedback
- Creative collaboration best practices

 **Goal**

Prepare your team to be super reviewers by providing a detailed understanding of creative collaboration best practices.

 **Attendees**

Anyone that is going to be a part of the creative collaboration process.

SESSION

1 Discovery workshop and admin setup

2 Team training - Part 1

3 Team training - Part 2

4 Post-launch touch base

 Agenda

During our **Post-launch touch base**, we will:

- Review previously uploaded assets and workflow setup to ensure full understanding and optimization Ziflow's capabilities
- Highlight recent feature releases and platform enhancements
- Address remaining questions and coordinate any next steps

 Goal

Set your team of Ziflow experts free to enjoy the benefits of creative collaboration!

 Attendees

Any Ziflow users.

Congratulations!

Your team is Success Start certified!

After you have completed your Success Start training, you can still:

- **Connect with your account manager** Don't hesitate to get in touch for strategic recommendations or with any questions. Our team is here to ensure that you are empowered to create exceptional creative, faster.
- **Visit our [Help Center](#)**. Access on-demand help articles through [this link](#), or by navigating to the initial icon in the top right corner of the platform and selecting Help. Here, you have the support you need to deliver exceptional work right at your fingertips.
- **Tell us what you think!** If you've got positive feedback that you're excited to share, please feel free to drop us a G2 review. Sharing your experience gives creatives just like you the opportunity to hear authentic feedback.

About Ziflow

Ziflow is the leading creative collaboration platform. It empowers agencies and brands to deliver exceptional creative work by streamlining feedback on any creative asset from concept to completion. Customers include Showtime, McCann Worldgroup, AWS, Weber, Specialized and Dupont. Ziflow was founded in 2016 and serves thousands of customers across the world. Ziflow has team members in the US, UK, Poland and South Africa.